Universiteit Leiden

Bibliotheken

EndNote X7 instruction
Leiden University Libraries

2015-2016

Inhoud

EndNote X7: introduction 1

Endnote Desktop and Endnote Online 1
Access to EndNote 1
Sharing references 1
Make a backup of your library 1

Part I 3

2. Creating a library 3

3. Direct Import 3

Project Muse 3
Google Scholar 4
Web of Science 4

4. Importing references from databases using text files: PiCarta 5

5. Create a new reference manually 6

6. How to handle PDFs? 7

If you like to, you can let Endnote rename your PDF's automatically the moment you upload them to a reference in your EndNote library. To use this option, go to the EndNote Menu*: Edit* > *Preferences* > *PDF handling*. Choose your settings for PDF automatic renaming options. This is also the place where you can select a 'watch folder' (see option 4 of Various ways of linking PDFs). 7
Add a PDF file to a reference 7
Check the EndNote Settings 7
Various ways of linking PDF's 8

7. Managing your EndNote library 9

Sorting, Finding and Viewing references 9
Searching for references 9
Checking for duplicates 9
Insert keywords, notes and research notes 10
Organise your references by creating groups 11

Part II 12

7. EndNote & Word or "Cite While You Write" 12

Output Styles 12
Word and the EndNote Tab 12
Inserting citations 12
In-text citations 12
Creating footnotes 12

8. Formatting a bibliography 13

Change the formatting style 13
Editing citations 14
Removing a citation 14
Modifying a citation 14
Edit Library reference(s) 14
Remove field codes 14

Formatted citations and Instant Formatting 15
Creating a separate bibliography 15

9. Extra's 15

EndNote: Frequently Asked Questions 16

General questions about EndNote 16
EndNote Online 16
Sharing your EndNote library 17
References: general issues 17
References: editing 18
References: importing from… 19
Cite While You Write: footnotes 20
Cite While You Write: bibliography 21

EndNote X7: introduction

EndNote is a bibliographic software programme which enables you to search for literature, develop a personal digital reference library, create and format citations for papers and publications. EndNote desktop comes together with EndNote Online.

A database (or library) in EndNote contains references or records; each record consists of 52 fields. No limit exists on the number of references you can create in an EndNote library though it is recommended that the number does not exceed 100,000 to maintain efficient performance managing the database.

Can I create more than one library?

Yes, you can create as many libraries as you wish, but it is *strongly* recommended to use one library for all your references:

- be sure to use one and the same library if you start to connect your references to a specific word document;
- choose one library to sync from EndNote desktop to EndNote Online and vice versa because changes made in any library will be reflected in all libraries;
- by default, , EndNote always imports references to the most recently used library.
  So, in case you want to maintain more than one library, you will have to select a specific library when importing your references. If this is the case, change the default settings for opening a library through EndNote *> Edit > Preferences > Libraries*.

Endnote Desktop and Endnote Online

Endnote is software, installed on the computers in the University Network. EndNote Online (formerly known as EndNote Web) is a web-based service and can be used complementary to Endnote Desktop. Endnote Online enables you to:

- access your references anytime anywhere
- share your references with colleagues (up to 14, including yourself).

For more information on EndNote Online see the FAQ.

Access to EndNote

EndNote X7 can be used from each (student) PC in the university network; for more information about access to EndNote on your home computer, see the FAQ at the end of this document.

Sharing references

EndNote allows to share your entre library including references, PDFs annotations, with up to 14 people, including yourself. You can include anyone who is using EndNote X7.3.
More information on sharing see the FAQ at the end of this document.

Make a backup of your library

Before you are going to share your files or to sync to EndNote Online it is important to make regular backups of the EndNote files. This can be done by creating a *compressed file* (.enlx) via the the *Compressed Library* command in the *EndNote > File* menu. This compressed library can be easily restored later by opening it in EndNote.

Part I

2. Creating a library

Exercise

- Open EndNote through *Start > EndNote Program*.
- If you open EndNote for the first time the program will offer you 3 options:
  Set up your account, Share your library, Learn more and Get connected.
  Save these options for later use; click next until an 'empty' EndNote screen is shown.
  - Click on *File > New*.
  - A window will appear asking you to name and save the new library.
  - Enter a name (say: *test.enl)* for your new library; EndNote libraries must end in the three-letter extension: *.enl*.
  - Choose a folder (for example on your desktop) where your library will be stored.
  - Click *Save.*
- (In case you have used EndNote before, EndNote will start in the last EndNote Library you were working in. Please follow the procedure starting after "Click on *File > New*.
  You now have a new empty library to start inserting your references.
- Close and Open an EndNote library.
  - To close your new library, go to *File > Close Library.*
  - To reopen your new library: use *File > Open.*
- To close the EndNote programme:
  - open *File > Exit*
  - or click on the X at the top right hand corner**.**

TIP: Each library consists of two files: an .enl and a .data file. The files belong together; if you want to move them to a new location, copy both files. Do not delete the .data file if you by accident lose your EndNote library. The .data file might help you to restore your library.

3. Direct Import

Some databases provide a *Direct Import* (also called *Direct Export*) option. This applies for most of the databases offered by Leiden University Libraries.

Important: EndNote has its own Online Search option; we do recommend you *not* to use it; searching via our Catalogue > Find Databases adds more precision to your search. For the exercises below go to http://catalogue.leidenuniv.nl/ > *Find Databases* and type the name of the database in the title field.

Project Muse

Find *Project Muse* within the *Catalogue > Find Databases* and open the database.
Perform a search for Ibn Battuta, a 14th century Moroccan Berber scholar and traveller.

Exercise

- Type *ibn battuta*;
- Have a look at the number of results and change *Items per page* to 75 to be able to select all items.
- Click on the *Save All Citations* button.

- In the upper right corner click on *Saved Citations (n).*
- Choose option 2: *Export to EndNote*.
- In the pop-up screen: choose *open.*
- Choose "EndNote"
- All references are being imported in your EndNote Library.

Note: we strongly recommend that you use one library for all your references. But in case you want to maintain more libraries, please see the FAQ's for information about setting your preferences.

Google Scholar

Go to *Catalogue* > *Find Databases* > Google Scholar.

Follow these steps to configure Google Scholar to send references to EndNote:

- Go to the Google Scholar home page at http://scholar.google.com.
- Click on the *Scholar Preferences* button.
- Under "Bibliography Manager" select the option *Show links to import citations into* and choose *EndNote* in the drop down box.
- Click on the *Save Preferences* button.

Exercise

- In Google Scholar, search for the following journal article:

  Kruk, R. (1995). Ibn Battuta: travel, family life, and chronology: how seriously do we take a father? *Al-Qantara,* 16(2), 369-384.

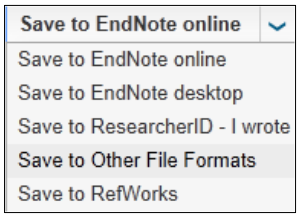
- click *Cite* > *EndNote* > to export this title to your database.
- Google Scholar shows an SFX-link; try to locate the PDF and save it on your desktop in order to add it later to this EndNote record.

Web of Science

Find Web of Science within the *Catalogue* > *Find Databases* and open the database.

Exercise

- Type *ibn battuta* in the topic field
- At the bottom of the page (Show … per page) change the number or results per page to *50*.
- Above the first reference, in the *Save to* - drop down menu choose *EndNote desktop.*
- In the next pop up screen choose *All records on page.*
- Change record content to *Full Record.*
- Click on *send*, the import process starts.


Save to EndNote online
Save to EndNote online
Save to EndNote desktop
Save to ResearcherID - I wrote
Save to Other File Formats
Save to RefWorks

- Imported references will be added to *All References* (see left column), but they will also be visible in a temporary group *Imported References.*
  - This makes it easier to have a closer look at the newly added references.
  - The imported references are marked with a grey dot which means unread.
  - If you click on this grey dot you can mark it as read.

TIP: while importing references from Web of Science and other databases you will also import the Digital Object Identifier or DOI. For more information about this identifier see the FAQ.

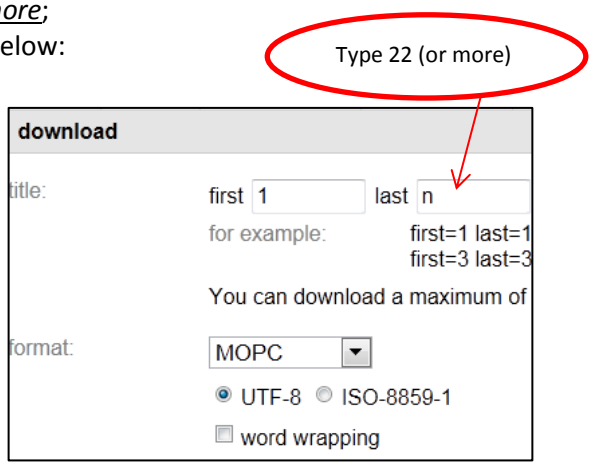
TIP: to find out how to import references from other databases see the FAQ on the last page.

4. Importing references from databases using text files: PiCarta

Some databases do not have a Direct Export option; in this case, you will have to copy the results to a *text file* before importing them to EndNote.

Exercise

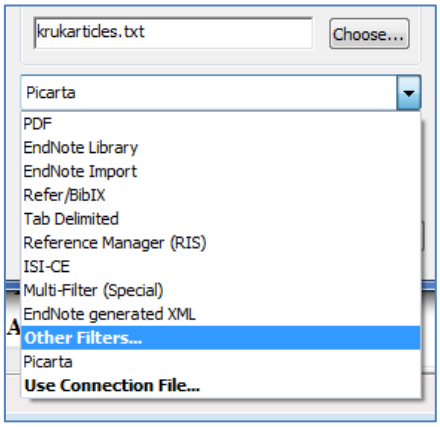
- Go to *PiCarta* on our website and open the database.
- Change the language into English.
- Perform a search *(all words)* for *kruk.*
- Click at the bottom of the webpage on *show hints.*
- See the left-hand column and click the *person's name: Kruk, Remke.*
- Importing references from PiCarta works without a problem if you collect books and articles *in two separate sets*.
- In order to do so, separate the articles from the books by clicking on *Filter (upper corner of the left-hand column*) and click on *Material code* > *Articles.*
- You can choose between Books, Articles, Online resources and Sound.
- To import *all articles* in PiCarta:
    - click download at the bottom of the screen;
    - save all references 1 – 22 *or more*;
    - choose the format as shown below:
        - *MOPC*
        - *UTF-8*
        - *exclude word wrapping*.

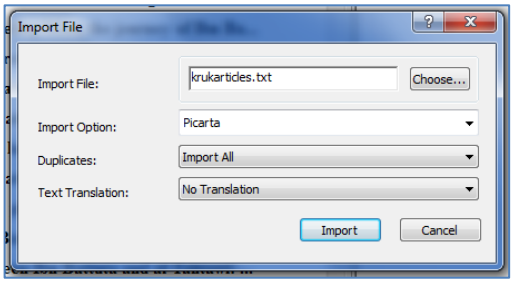


TIP: see FAQ for more information about symbols and diacritics.

- Next: click *Save* > *Save as*.
- You could change the name to *Kruk articles* but leave the extension .txt unchanged.
- Store the file on your desktop.
- Next: go back to the EndNote library which is still open.
- Choose *File – Import - File,* in the next popup screen you.

- Choose the correct file (*kruk articles)* from the desktop, click *Open*.





- Select: *Import Option: Other Filters > PiCarta*.
- *Duplicates:* Import All;
- *Text translation*: no translation
- Click *Import.*

Imported references will be added to *All References* (see left column), but they will also be visible in a temporary group *Imported References*; to see all references click *All References* in the left hand column. Browse through some imported records; you may have to edit some references.

Exercise

Now import from PiCarta the set of books written by Remke Kruk, following the procedure used in the previous exercise.

Note: It is also possible to export references from Leiden University Catalogue via direct export but this might lead to more editing. More information about exporting references from the Catalogue see the Faq.

5. Create a new reference manually

Occasionally you may have to add a reference manually.
This can be done in your open EndNote library: *References > New Reference*.
Select the appropriate *reference type* (book, blog, journal article etc) and fill in the fields needed to build a complete reference.

Author names & names of organisations

Please pay attention to the rules below on how to enter the author field:

- always enter author and editor names one name per line. Use the Enter key to move from line to line.
- Always enter *last name first*, followed by *initials or the full first name*:
  - *Obama, Barack* or *Obama, B.*
- EndNote needs *a comma* to identify a last name.
- Last names have to be capitalised because EndNote will not change un-capitalised names.
- For *organisations,* include *a comma*:
  - U.S. Department of Education,
  - Leiden University,

TIP: For more information on complex author names and page numbers: see FAQ.

TIP: *You may have noticed that when you enter a reference or make changes in a reference, certain fields turn red. For more explanation about this feature, see the FAQ:* Term list & red text.

6. How to handle PDFs?

You can enrich your library by adding PDFs to the references. This can be done manually by saving a PDF to your computer, selecting in your EndNote library the reference, clicking on the paperclip in the reference panel, choose *Attach File* and select the pdf. Compare the bibliographic information of the PDF with the reference in your library: maybe your reference needs some adjustments.

If you like to, you can let Endnote rename your PDF's automatically the moment you upload them to a reference in your EndNote library. To use this option, go to the EndNote Menu*: Edit > Preferences > PDF handling*. Choose your settings for PDF automatic renaming options. This is also the place where you can select a 'watch folder' (see option 4 of Various ways of linking PDFs).

Add a PDF file to a reference

Exercise

- Within your EndNote library, select the journal article with the title: *Ibn Battuta, travel, family life and chronology.*
- Click on the paperclip in the reference panel > *Attach File* and from your desktop select the saved PDF – from the Google Scholar search - > click on open.
- The PDF will open in EndNote's PDF viewer; just click on *Reference* left of the PDF viewer to return to the record. Have a look at the field *File Attachments* where you will see the attached file.
- Compare the title of the PDF with the EndNote- record title imported title from PiCarta You might have to edit some fields.

You can also let EndNote search for PDFs. To be able to do this, some settings in EndNote may have to be changed.

Check the EndNote Settings

- Go to *Edit – Preferences > Find Full Text*
- Check the boxes for all options: *ISI Web of Knowledge Full Text Links, DOI (Digital Object Identifier), and Open URL*.
- In the box OpenURL Path type *http://sfx.leidenuniv.nl/sfx_local?*

- Leave the box *Authenticate with URL* empty; remove the link if present.
- Click *Apply*.
- Next, check the settings for URLs & Links. The box *ISI Base URL* has to show the line: *http://gateway.isiknowledge.com/gateway/Gateway.cgi.*

- Click Apply and OK.

Various ways of linking PDF's

1) *linking PDFs through Find Full Text*

Note:
This option leads to an automatic attachment of the PDF or url. It only works for Leiden University subscribed articles but it does not work flawless.

Exercise

- Select one or more references from your library e.g. all ISI Web of Science records by holding down the Shift key.
- Right-click and choose *Find Full Text*.
- Have a closer look at the bottom of left hand column: see how *Full Text Found* shows the references with pfd.
- The PDFs will be stored in the data folder of your actual library.
- If this does not work good enough, try option 2: *OpenURL*.

2) *through OpenURL Link or Open URL*

- To search for the PDFs for articles you have already inserted in your EndNote library:
    - Select a single reference by clicking on it.
    - Right-click on the selection you made and choose *URL > OpenURL link*.

- Follow sfx to access the PDF; save the file to a place you will remember or to your EndNote *'watch folder'*. (see option 3 and 4 below)
    - In EndNote, select the reference, right-click and choose *File Attachments > Attach file*.
    - Browse to the saved PDF; select the file and click *Open.*
    - The PDF will be attached to the reference.

3) *Through importing an (existing) folder of PDF Files*

Select in the EndNote Menu: *File > Import > Folder* with or without subfolders and group sets. When all your options are set, click the Import button. This folder *could* become your 'watch folder' for automatic import. See option 4.
Note*: EndNote will attempt to attach PDFs to matching records that already exist in the library instead of creating duplicate records.*

4) *Automatic import from a watch folder*

Any PDF added to this automatic importing folder will be imported into the EndNote library. Automatic importing takes place after opening the library. Importing can be triggered by clicking on any reference in the reference list.
To use this option, go to the EndNote Menu: *Edit > Preferences > PDF handling,* select the 'watch folder'.

Tip: the content of a PDF is searchable through Quick Search and the Search panel.

7. Managing your EndNote library

In this section, you will learn how to sort your references, find duplicates and how to insert keywords.

Sorting, Finding and Viewing references

The EndNote Library window displays 10 columns. These columns can be dragged and dropped. The order (oldest, newest, A-Z, or vice versa) in which references are displayed can be changed by clicking on the column (field) headings. Column headings can be changed via *Edit > Preferences > Display Fields.*

Searching for references

- scroll through the list by using the arrow keys on your keyboard or
- use the *quick search*

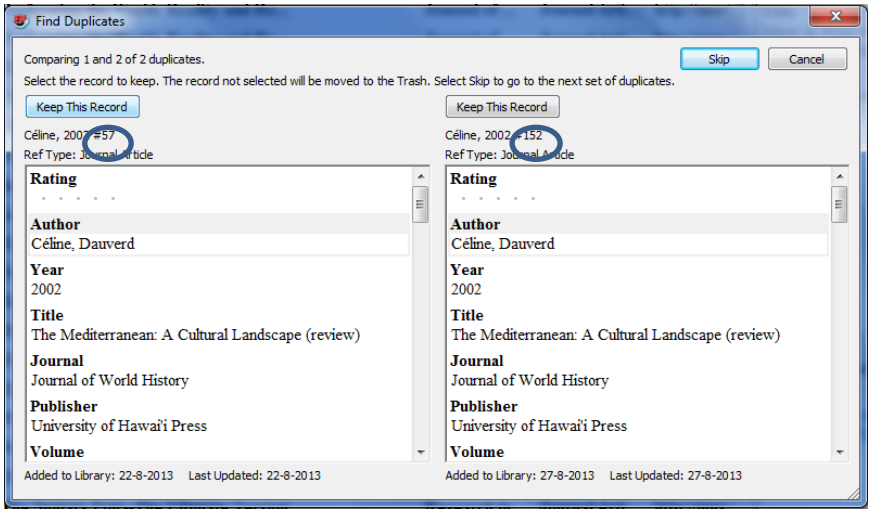
button to search in one field only and type the first few letters or digits of an author name or publication year.
- scroll from a complete reference to another use the arrow buttons.
- use the *Search Panel* for an advanced search to combine multiple fields.
- check the preview of a formatted reference in the *Reference Panel*, click on the tab *Preview.*

Checking for duplicates

If you import from more than one source, you may end up with some duplicate references in your library. Before adding references to a Word document, it is important to remove these duplicates. To find duplicate references in a library:

- With the Library window open, click on All *References* in the left column.
- From the References menu, choose *Find Duplicates*
- EndNote will display a *Find Duplicates* dialog box, where you can compare duplicates and decide which version to keep and which to delete.
- For each set of duplicates, you have the option to:
    - click *Keep This Record* to save that particular reference and throw the other one in the Trash
    - click *Skip* to leave both references in the library intact. They will appear in a temporary Duplicate References group, so you can review them later
    - click *Cancel* to stop the Duplicate References operation. All duplicates will appear in a temporary Duplicate References group if you wish to review them.

TIP:. Each reference has an unique number. The older (first entered) reference will always appear in the left column.



Corrections: You can copy / paste information from one record to the other before removing one of them.

Warning: Before selecting *Keep This Record*, which will delete the duplicate, check the record numbers to be sure that you are not deleting a reference already cited in a paper.

Keep in mind:
EndNote will not always manage to find every duplicate reference. If this problem occurs, sort the library by author or title and spot duplicates by eye. To remove a duplicate, use the Delete button or right-click > *Move References to Trash*.

Exercise

- Manually compare (use the search panel) the two records from Kruk 1995 with the title: *Ibn Battuta: Travel, family life, and chronology*. One record was imported from Google Scholar, the other from PiCarta.
- Decide which changes you want to want to make before removing one of the records.

Insert keywords, notes and research notes

If your library contains many references, use a keywords system to locate them and to organize your titles. You can use a keyword system from a database for example MLA or PubMed or you can create your own system. If you enter personal keywords, EndNote will add them to the *Keywords Term List.*

Exercise

- Open a reference and add keywords in the Keywords field and/or individual research notes in the *Research notes* field
- Be sure to separate your terms in the field with a semi-colon (;) or a hard return (hit "Enter" between terms) to ensure each term is indexed separately
- Phrases will be indexed as long as the words appear in one line with no intervening semi-colon
- Have a look at the Terms Lists via: *Tools – Open Term Lists*.

NOTE: EndNote keeps track of the inserted keywords and completes them automatically. The auto-complete feature can be turned on or off via *Edit – Preferences - Term List* – deselect *Suggest Terms as you type*. It is available for Author fields when you enter author names with the last name first.

TIP: for more information about *Term Lists*, i.e. creating a new *Term List* and modifying terms see *Help* – type *term lists* – choose *Important Points* about term lists and*: Related topics – Modifying Terms*

TIP: for more information about unwanted capitalisation of titles see: *FAQ > How to change citations in uppercase.*

TIP: A citation from the EndNote Manual: *"The Notes, Research Notes, and Abstract fields can each hold up to 64,000 characters, which is equivalent to about 16 pages of text. Use the Notes field to*

store personal reminders, such as the location of a quotation in a book or the quotation itself. Use the Abstract field for a brief description of the contents of the work.

Organise your references by creating groups

Organising your references in groups enables you to create subsets of a large library. For more information about custom groups and smart groups see the Help-function of EndNote.

Part II

7. EndNote & Word or “Cite While You Write”

Cite While You Write (also known as CWYW) is a key feature of EndNote. It allows you to:

- access EndNote from within Microsoft Word to insert citations into your documents
- insert citations anytime during your writing process
- build a bibliography from the citations you insert in any desired style
- change the formatting (using "output styles") for the citations and bibliographies.

Output Styles

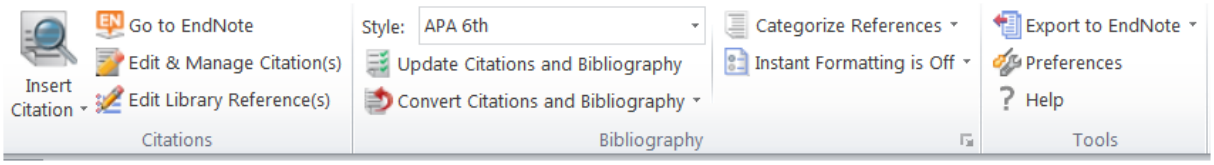
EndNote contains many (> 6.000) pre-defined output styles according to the regulations of societies, such as MLA, APA, and Chicago or journals. Style Manuals and their locations can be found within our Catalogue: http://catalogue.leidenuniv.nl.

Each style has a format for:

- in-text citations
- citations in a footnote or bibliography
- separate bibliographies.

Word and the EndNote Tab

This manual is written from the perspective of Word 2010.
When EndNote was installed, an EndNote X7 Tab with an EndNote ribbon has been added to Word,



Inserting citations

You can insert citations as you write your document - *Cite While You Write* or *CWYW* - , or if you prefer to wait you could enter the citations after you have finished writing.

In-text citations

Exercise

- Open a Word document or make a new one and type some text. Save it first using another name
- In your Word document, position the cursor where you want to insert the first citation.
- Click the *Go to EndNote* button and select the citation you wish to use in your Word document.
- Return to Word by using the R*eturn to Word Processor* button.
- In your Word document, open the drop-down menu *Insert Citation* and select *Insert Selected Citation(s)*.

Creating footnotes

Exercise

- Again, type some text, and put the cursor where you want to insert a footnote.
- In your the Word document choose *the tab References > Insert Footnote*
- Go to your EndNote Library and select a reference.
- Return to Word and click on *Insert Citation and select Insert Selected Citation(s).*
- Do not forget to save your Word document after inserting citations.

TIPS: for more information about citing in footnotes: see the Faq > More information about citing in footnotes.

8. Formatting a bibliography

Change the formatting style

You may wish to change the output style.

Exercise

Continue with the Word document from the previous exercises.

- In Word, from the EndNote Tab > Bibliography section, open the drop-down menu behind *Style*.
- Choose the standard style *'numbered*".
- Now change the style to "*Author – Date".*
- Click *Select another Style* to choose a preferred style from the list in the dialogue box e.g. *Amer. Anthropologist or APA*.

Note: An output style selected in Word is the final format for your document. Make sure to select the same style in your EndNote library; the *Preview-tab* in the *Search Panel* will then show you the correct format of a reference in the preferred output style.

Exercise

You can add a new style to the list of preferred styles.

- Go to your EndNote Library and open *Edit > Output Styles > Open Style Manager.*
- Have a closer look at the style list and select an alternative style.
- The selected styles will be added to list of favourite styles in EndNote as well as the Style-menu in Word.
- Return to your Word document and choose a new style.

Exercise

An easy way to search for EndNote references and insert them without ever leaving Word is shown in this exercise.

- Type some text and add a new citation to your Word document via the procedure below.
- Move in Word to the EndNote Tab, open *Insert Citation > Insert Citation*. The EndNote *Find & Insert My References* dialog box appears.
- In the dialog box, enter text (such as the author or title) in the *Find text* box to identify your reference.
- EndNote searches all fields in its library records to find matches.
- Select and insert the citation.

Editing citations

Note: If you need to change (add, modify, or delete) your formatted citations in your Word document, always use the *Edit & Manage Citation(s)* command as explained in the exercises below. The in-text citation as well as the full citation will be changed or removed. Do not use the backspace or delete key.

Removing a citation

Exercise

- In your Word document, click on the citation you wish to change.
- With the right-hand mouse button: choose *Edit Citation(s)* > *More*.
- The *Edit and Manage Citations* dialog box appears.
- The citation is already selected.
- Click on *Edit Reference* next to the citation.
- Click on *Remove Citation.*

Warning: This is the only way to remove a citation from your Word document; never use the delete button.

Modifying a citation

With the *Edit & Manage citations* button it is possible to modify certain parts of an in-text citation.

- In the Word document go the citation you want to change; click on the right mouse button.
- Select: Edit Citation(s); *The Edit and manage Citations* dialog box appears.
- Exclude the author or the year by clicking the "Exclude author" or "Exclude year" checkboxes.
- or select *More* for other changes, like adding a page number.
- Close the dialog box.

Edit Library reference(s)

This allows you to make changes to a reference while you are writing in Word (for example, to change spelling errors).

- Position the cursor in a Word citation.
- Click the *Edit Library Reference(s)* button.
- EndNote opens the reference.
- Modify the reference and close.
- Back in your Word document, in the EndNote Tab, click the Update Citations and Bibliography button (in the Bibliography box).
- The changes will be shown in your Word document.

Remove field codes

Removing field codes means deleting Word's *Cite While You Write (CWYW*) codes and saving the formatted citations and bibliography as text. When field codes have been removed, in-text citations are no longer linked to an EndNote reference. In-text citations become plain text. Because EndNote and Cite While You Write cannot re-format your paper once field codes are removed, the *Remove Field Codes* command makes a *copy* of your document without codes. Word saves your document without embedded formatting codes, so you can submit your paper to a publisher or share your final paper with a colleague.

Exercise

- In the EndNote Tab in Word > Bibliography section, select *Convert Citations and Bibliography* > *Convert to plain text* .
- After saving the original formatted document the plain text document appears.

Formatted citations and Instant Formatting

Via CWYW, EndNote formats a citation in any style you want. This is called *Instant Formatting*. Sometimes you might want to turn Instant Formatting off, as it can be time-consuming to refresh your bibliography each time a new citation is inserted. For more information on Instant Formatting see the FAQ's on this subject.

Creating a separate bibliography

You may need to create a separate bibliography, for instance to show all found references to your colleagues or teachers. Do the exercise below to find out how this can be done.

Exercise

- Create a new Word document.
- Go to your EndNote library and put the cursor in a reference.
- Select all references (Ctrl-A) or just a few.
- Return to Word and choose *Insert selected citation(s).*
- References appear, but do not delete anything yet.
- Choose the preferred style.
- Once the definitive list is created, choose *Convert Citations and Bibliography> Convert to plain text.*
- Only then remove the in-text citations on top of the page.

TIP: To create a bibliography at the end of each chapter: use the help pages in EndNote and search for: creating multiple bibliographies in a single document.

9. Extra's

What's new in EndNote X7;
https://www.youtube.com/watch?v=FqvYH0FUXps

The EndNote help manual can be found through
http://endnote.com/support/online-user-manual/x7

For trouble shooting: http://www.endnote.com/support/ensupport.asp

For more questions or comments on this manual please send an e-mail to:
helpdesk@library.leidenuniv.nl

EndNote: Frequently Asked Questions

General questions about EndNote

How to access EndNote outside the Leiden University Network?

Staff members can use the EndNote programme through Remote NUWD.
Students can use EndNote Web to synchronise it later with EndNote Program within Leiden University Network.

Can I buy the EndNote Programme?

If you want to install EndNote on your personal computer, you can buy the programme at https://shop.researchsoftware.com/.

EndNote Online

How can I get an EndNote Online account?

Students and staff from Leiden University can register for a free EndNote Online account during the period of their study/appointment. There are several ways to create an EndNote account:

a. You can create an account the first time that you start EndNote. Follow the online instructions.
b. In EndNote click the *Sync* button that appears in the toolbar to open an EndNote Web Login dialog. Click the *Sign Up* button to begin the registration and activation process. Follow the online instructions.
c. In EndNote, go to the *Edit menu* > *Preferences* > *Sync.* Click the *Enable Sync* button to go to the EndNote Web Login dialog. Click the Sign Up button to begin the registration and activation process. Follow the online instructions.

Tip: The syncing process is always initiated in EndNote. You can change the syncing preferences from automatically to manually. Be sure to work in the *Integrated Library and Online Search Mode* before starting the sync process.

For a Quick Reference Card about EndNote Online see: http://endnote.com/support/online-user-manual/x7 or search Youtube .

EndNote for alumni: EndNote Basic

Before leaving Leiden University EndNote references can be transferred to a free (online) EndNote Basic account with less storage and files attachment. To transfer the references from EndNote to EndNote Basic you will have to export the references to a text file.

How to import your references from EndNote in a free EndNote Basic account

In EndNote Program, open the library. In the taskbar select Another Style > EndNote Export.
Select all the references you want to export and click File > Export. In the dialogue box: check the name, the extension (.txt) and the output style (EndNote Export). Next: save the file. Open your EndNote Basic account and move to the tab Collect > Import References. Browse to the file location, select the txt-file, choose Import Option > EndNote import and import the references.
For more information on EndNote Basic, watch: http://www.youtube.com/watch?v=tDoycBN9nus

Sharing your EndNote library

Sharing through EndNote Online

In Endnote go to the *Sync Library button* or *File > Share*
First: backup *(File > Compressed Library)* and sync your library
Everyone can add to, annotate and use the library – at the same time
There's no charge for sharing, no library size limit and no charge for unlimited cloud storage
For more information: http://endnote.com/product-details/library-sharing

I want to share a few references in an email for adding them to someone else's EndNote library

In Help see: Sharing Word documents, Traveling Library

In Word > create a (small) bibliography containing the formatted reference(s) you want to share.
Send the Word file attached to an email.
To add the references to an EndNote Library: open the Word doc and the EndNote tab > Tools > Export to EndNote > Export Traveling Library.
Or:
Open both your Word document and the EndNote library. Then, in EndNote, go to the Tools menu, then the Cite While You Write submenu, and select Import Traveling Library.
Note: A traveling library does not contain Notes, Abstracts, Figures, or Captions.

References: general issues

What is a DOI or a Digital Object Identifier

While importing references from Web of Science and other databases you will also import the DOI. DOI *(Digital Object Identifier*) is a unique alphanumeric string assigned by a registration agency (the International DOI Foundation, see www.doi.org to identify a specific publication and provide a persistent link to its location on the Internet. The publisher assigns a DOI when an article is published and made available electronically. The APA recommends that when DOIs are available, you include them for both print and electronic sources. The DOI is typically located on the first page of the electronic journal article, near the copyright notice. The DOI can also be found on the database landing page for the article.

Does EndNote recognize symbols and diacritical characters?

Endnote uses the UTF-8 character set, which contains most characters. In very special cases you may see characters that are not recognized. EndNote shows these as a box. In this case, type the missing character in the same way as you would type the character in your word processor. If you are using non-Western fonts for your research, you will know how to install additional input languages with Windows, by going to Control Panel and selecting the Regional and Language Options, and then clicking on the Languages tab.

Why do certain fields turn red?

This is caused by the fact that Endnote creates so called indexes or term lists for author names, keywords and journal names. EndNote updates the term lists automatically as you enter new references into your library. If you enter a new name that is not already in your Author list, the name appears in *red text* to indicate that it is a new addition to the term list. When you close or save the reference, that new term is added to the list.

References: editing

Updating author names

There may be variations of an author's name in your data. For example: *Joe Cool, Joe A. Cool,* J. A. Cool, etc. Since some styles prefer whole names and others abbreviated first and middle names, it is best to update names to full names and leave the work of abbreviating to the EndNote styles. But: for complex author names (Jr., II, multiple-words) always enter last name first, followed by initials:

- *de Gaulle, Charles*
- *de la Rey, V.*
- *De Boer, J.*

Page numbers

Page ranges can be entered as complete; the style used to create the bibliography can change the page numbers to full, abbreviated or first page. EndNote recognises the following forms; use a comma to separate non-consecutive ranges:

- 37-41
- 441-7
- 15-17, 19, 85-89.

How to change citations in uppercase?

Some online resources import citations in UPPERCASE. When you do not want these citations to appear in your Word document, you will have either to edit the references into lower case, choose a style, which converts uppercase into lower case, or edit your current style so that it will convert your references accordingly.

Styles in EndNote are set up in one of three ways:
1. Leave titles as entered
2. Headline style capitalization e.g.
   Memory in Hearing-Impaired Children: Implications for Vocabulary Development
3. Sentence style capitalization e.g.
   Memory in hearing-impaired children: Implications for vocabulary development.

Make sure your required style is selected in your styles box

- *Choose Edit - Output styles - Edit "name of style"*
- Your style template will open for editing.
- From the left hand side of the screen choose *Bibliography -Title Capitalization*
- (You can also choose *Footnotes-Title Capitalization* if you are using a footnote style)
- Select your preferred option.

Formatted citations and Instant Formatting

Via CWYW, EndNote formats a citation in any style you want. This is called *Instant Formatting*. Sometimes you might want to turn Instant Formatting off, as it can be time-consuming to refresh your bibliography each time a new citation is inserted. This can be done in the EndNote tab in Word through the option

- *Convert Citations and Bibliography > Convert to Unformatted Citations* .

- Next, your in-text citations will be shown as temporary citations with author name, publication year and record number; the bibliography will be removed.
- To re-format your citations you only will have to click *Update Citations and Bibliography*
- For a more permanent use of unformatted citations, e.g. at the start or in the middle of a document, Instant Formatting can be turned off in Word in the Bibliography section > in the pull down menu select T*urn Instant Formatting off*.
- Another way to approach Instant Formatting and more general CWYW preferences can be found in *EndNote > Tools > Cite While you Write > CWYW Preferences*.

References: importing from…

Catalogue Leiden University and LUMC

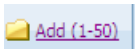
- Perform a search in the Catalogue; select the items you wish to export to EndNote (click the star).
- Go to the e-Shelf and select the items again. You can export 30 items in one go.
  Next, select *To EndNote etc*,; in the *Push to Export box* choose *UTF-8*.
- In the download screen – enlarge the screen - choose *Open > EndNote*. You may have to edit the references, pay special attention to the Author/Editor, series title.
- In case you want to export one single reference at a time; open the tab *Details* and look for the option *Actions* (upper right corner of the record) > *To EndNote etc.*
- To store items on the e-Shelf permanently, sign in before selecting items.

Note: An import from PiCarta returns more complete records.

JSTOR: direct export

Search JSTOR as you normally would.
Select the citations you want to export to EndNote and within the Citation Tools select *Export* > *Open* and select RIS-file EndNote etc.
Choose *Open* and next, if needed, choose *EndNote*.
In the "Open- with" dialog box, choose *EndNote Program*.

PsycINFO/PsycArticles: direct export

Perform a search as you normally would do.
Use the *Add-to-folder* button to select the items or use 

to add all references on page.
Click *Add to folder* to place the selected items in your folder for exporting multiple items. Open the folder and click ; select "*Direct Export in RIS format*". Click *Save* to import the items.
To export one single citation open the complete record and use the export tool in the right hand column.

Pubmed: Direct export

Perform a search in PubMed. Select the items you wish to export to EndNote. Click the *Send to menu* and select Citation Manager.

Pubmed: import text file

- Perform a search in Pubmed.
  Use the check boxes to mark the items you wish to export to EndNote. You can send the items to the *Clipboard* for later downloading using the *Send to drop-down menu.*
  When you are ready to download (or from the Clipboard), click the *Send to* menu**.** Select *File* under *Choose Destination*.
- Select *MEDLINE* from the *Format* drop-down menu.
- Click *Create File* (you may need to turn off pop-up blockers).
- *Save* the file to your desktop as a *.txt* document.

- Return to *EndNote*, choose *File > Import*.
- Browse to find your .txt file and Select *PubMed (NLM)* filter for the Import Option.
  If you do not see PubMed (NLM) on the drop-down menu, click *Other Filters*.
  Browse to *PubMed (NLM).*
- Click *Import.*

Cite While You Write: footnotes

Footnotes are used in referencing in two different ways:

- **Author-date styles** like APA and Harvard normally contain references within the text of the document. However if the author has added some text in a footnote, it is permissible to add a citation there, in the normal form, such as (Smith, 1998).
  Note: APA style does not encourage the use of footnotes! See the APA style manual for more information.
- **Footnote styles** are quite different. All referencing is done in the footnotes.
  Typically, the full details of the reference are given at the first point where it is cited, and an abbreviated format is used if the reference is cited again later. If the document is a lengthy one (e.g. a thesis or book), there will often be a separate bibliography at the end, where the references are again given in full.
  The *Chicago Manual of Style* includes provisions for this type of referencing, and the corresponding EndNote output style is called *Chicago A*.

- **To find out how a particular output style handles footnotes:**
  In EndNote, click on *Edit* on the top menu bar, then *Output Styles>Open Style Manager*
  Highlight the relevant output style and click on *Edit*. When the edit window opens, go to *Footnotes* in the left-hand pane, and click on the subheading *Templates*.
  On the right-hand side of the edit window, you will see a drop-down menu showing how EndNote formats citations in the footnotes:
  1. If the setting is *Same as citations*, EndNote will format the references like the citations in your text, which is probably something like: (Smith, 1999).
  2. If the setting is *Using footnote format*, EndNote will format the references in a special footnote style, which is defined in the *Templates Pane* below the drop-down menu.
  3. If the setting is *Same as bibliography*, EndNote will format the references in the footnotes in the same way as the references in the bibliography at the end of your document. This setting is rarely used.

- **Using footnote styles (e.g. Chicago, Bluebook)**
  In your Word document, make sure the cursor is in the correct place (i.e. where you want to insert the footnote reference mark).
  - Use the Word menu > Insert > References > Footnote > Insert
    You might have to choose between *footnote* (where the notes appear at the bottom of each page)
  - or *endnotes* (where the notes appear at the end of the document).
    Note: Do not confuse this use of the term *endnotes* with your EndNote software.
    Now use the EndNote *Insert Citation* button to insert the citation in the Footnote.
    Repeat this procedure for each footnote.

- **Page Break**
  You must insert a *Page Break* before the bibliography at the end of the document. This will

ensure your bibliography is printed on a separate page at the end of your document, while the footnotes will appear at the bottom of each page, correctly formatted.

- **Major changes to the footnote style**
  In EndNote choose *Edit > Output Styles > choose the style you are using > select Footnotes* and select one or more of the options shown in the left-hand column depending on the fields you want to change, like Author Lists, Author Name or Title Capitalization.

- **To insert specific page numbers in footnotes:**
  To include specific page numbers for a reference in a footnote:
  - highlight the citation in the Word document and select the button *Edit & Manage Citation(s)*. You will now see a dialogue box. The selected citation has been highlighted.
  - Below the tab *Edit Citation* > *Pages* type the page number(s).
  - Click on the *OK* button. This will only work if the EndNote output style is configured to cope with *Cited Pages*. Most styles that provide for specific footnote formatting are configured in this way.
  - Citations may appear twice or more. Use *Edit Citations* to make corrections.
  - Do not insert page numbers in the EndNote Library to edit a citation; only use the Edit Citation-option in Word.
  - Note *that* specific page numbers will not appear in the bibliography at the end of the document
  - If you change your style manager, the footnote style also changes.
  - TIP: Inserting page numbers works much faster when you click on the right mouse button, go to *Edit Citation*; click on More, then scroll to the highlighted citation.

Cite While You Write: bibliography

What if you don't want a bibliography at the end of the document?

Most of the footnote styles supplied with the EndNote software will format the references in the footnotes and produce a bibliography at the end of the document. If you are writing a short work (e.g. a journal article), you may not require a separate bibliography at the end of the document.

To edit the output style so that it does not generate a bibliography at the end of the document:

- Go to the *Styles Manager* and open the style for editing.
- Select *File>Save As*, to save the output style under a new name.
- In the left-hand frame, click on the Footnotes heading.
  - Under this heading, select the *Templates* section.
  - On the right-hand side of the edit window, uncheck the box labelled *Include citations in bibliography*
  - Close the edit window by clicking on the X button.
  - When prompted, save the changes that you have made.

- Return to Word.
  - Select the edited output style
  - use the *Update Citations and Bibliography* command (or the *Format Bibliography* command in earlier versions).